

**SELF- GUIDED PRACTICE WORKBOOK [N42]**  
CST Transformational Learning

WORKBOOK TITLE:

**Nursing: OR Manager/Team Lead  
(Dynamic Case Tracking)**

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## # SELF-GUIDED PRACTICE WORKBOOK

<b>Duration</b>	<b>1 hour</b>
<b>Before getting started</b>	<ul style="list-style-type: none"><li>■ Sign the attendance roster (this will ensure you get paid to attend the session)</li><li>■ Put your cell phones on silent mode</li></ul>
<b>Session Expectations</b>	<ul style="list-style-type: none"><li>■ This is a self-paced learning session</li><li>■ A 15 min break time will be provided. You can take this break at any time during the session</li><li>■ The workbook provides a compilation of different scenarios that are applicable to your work setting</li><li>■ Work through different learning activities at your own pace</li></ul>
<b>Key Learning Review</b>	<ul style="list-style-type: none"><li>■ At the end of the session, you will be required to complete a Key Learning Review</li><li>■ This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.</li></ul>

## Using Train Domain

You will be using the train domain to complete activities in this workbook. It has been designed to match the actual Clinical Information System (CIS) as closely as possible.

Please note:

-  Scenarios and their activities demonstrate the CIS functionality not the actual workflow
-  An attempt has been made to ensure scenarios are as clinically accurate as possible
-  Some clinical scenario details have been simplified for training purposes
-  Some screenshots may not be identical to what is seen on your screen and should be used for reference purposes only
-  Follow all steps to be able to complete activities
-  If you have trouble to follow the steps, immediately raise your hand for assistance to use classroom time efficiently
-  Ask for assistance whenever needed

## PATIENT SCENARIO – Access and Set-up

### Learning Objectives

At the end of this Scenario, you will be able to:

-  Utilize the Dynamic Case Tracking to view and update surgical cases
-  Utilize the Dynamic Case Tracking to update surgical case details and set events
-  Utilize drag and drop functionality to change surgical cases to another time or room
-  Utilize the swap room functionality

### SCENARIO

In this scenario, a review of how to access the Dynamic Case Tracking and manage cases for the day.

As a OR Manger/ Lead you will be completing the following activities:

-  Access the Dynamic Case Tracking
-  View and Update Surgical Case details and Set Events
-  Use Drag and Drop Functionality
-  Use the Swap Room Functionality

## Activity 1.1 – Dynamic Case Tracking

### 1 Overview of Dynamic Case Tracking

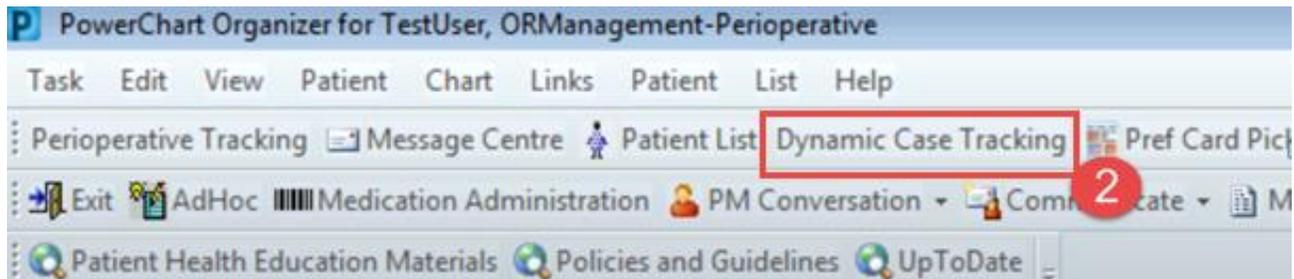
Dynamic View is used for day-of surgical board management. The Dynamic Case Tracking functionality allows for someone managing the OR to see a snapshot of real time cases and make efficient alterations to the day's schedule.

The primary benefits of Dynamic Case Tracking are:

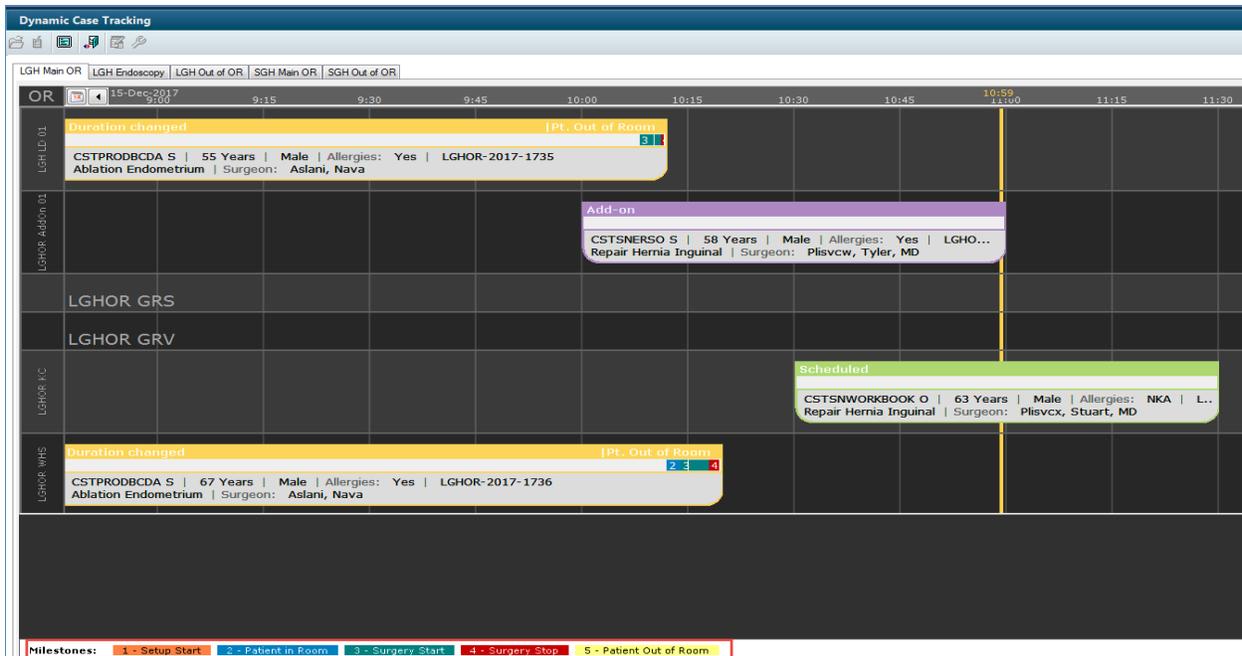
- Identify scheduling gaps
- Visually View case progress along a time axis
- Scroll forward and backward in time to view cases scheduled within # hours
- View and modify case attributes and case details
- Drag and drop cases
- Swap cases
- Open the patient's chart from Dynamic Case Tracking

### 2 Access Dynamic Case Tracking

1. Login to **PowerChart**.



2. Click the Dynamic Case Tracking tab.



**Note:** The border color on the cases changes whenever any of the following status changes occur:

- Scheduled - Green
- Earlier than scheduled - Green
- Later than scheduled - Green
- Room Changed - Green
- Add on - Purple
- Duration changed - Yellow
- Canceled - Red



As the patient statuses (milestones) are documented, they will appear along with the case status of each case detail box

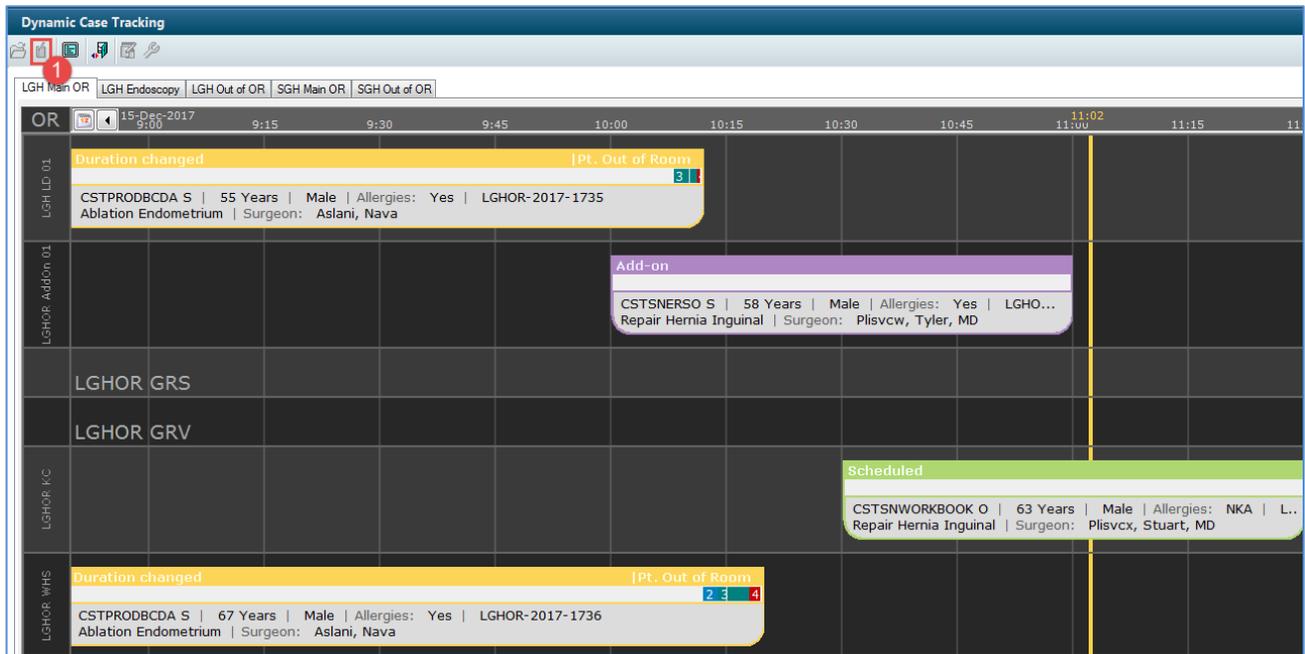
3. Click **Refresh**

### 3 Viewing and Managing Case Details:

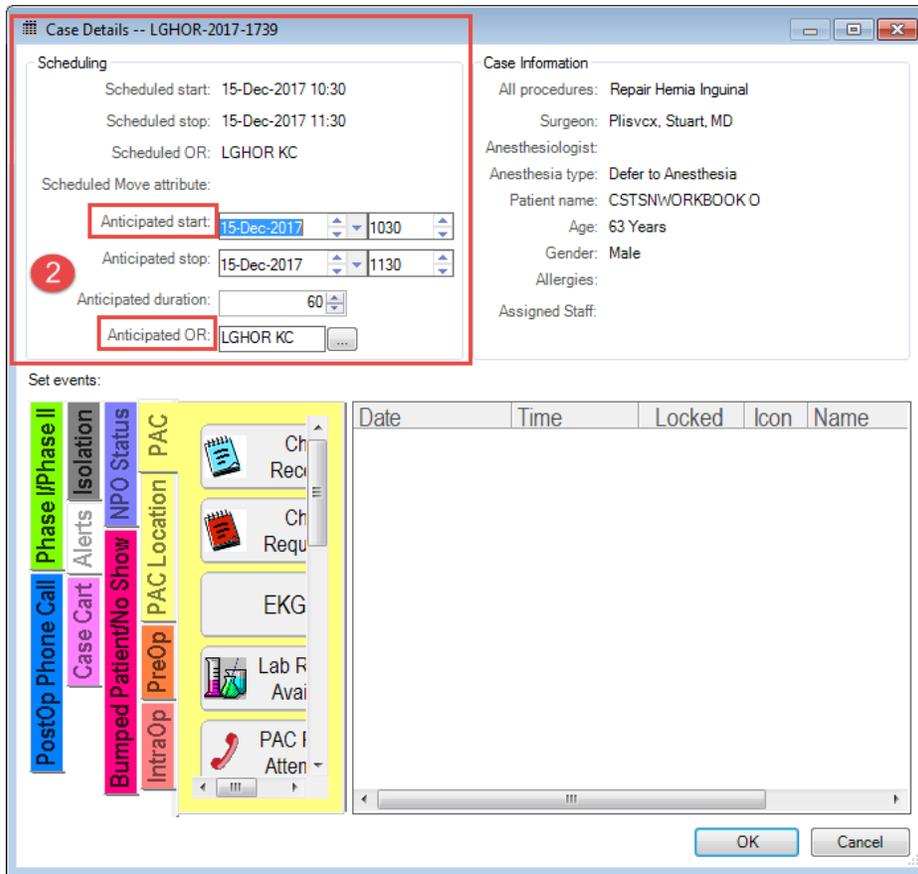
Each surgical area has a specific view set up in which scheduling of cases, case details, and set event information are displayed and can be managed.

Complete the following steps to view scheduling, change case details, and set event information for a case.

#### Change Case Details within the same OR:



1. In **Dynamic Case Tracking**, select the case you want from **LGHOR GRV** to view. Click **Case Details**  (or right click on the case and select **Case Details**).



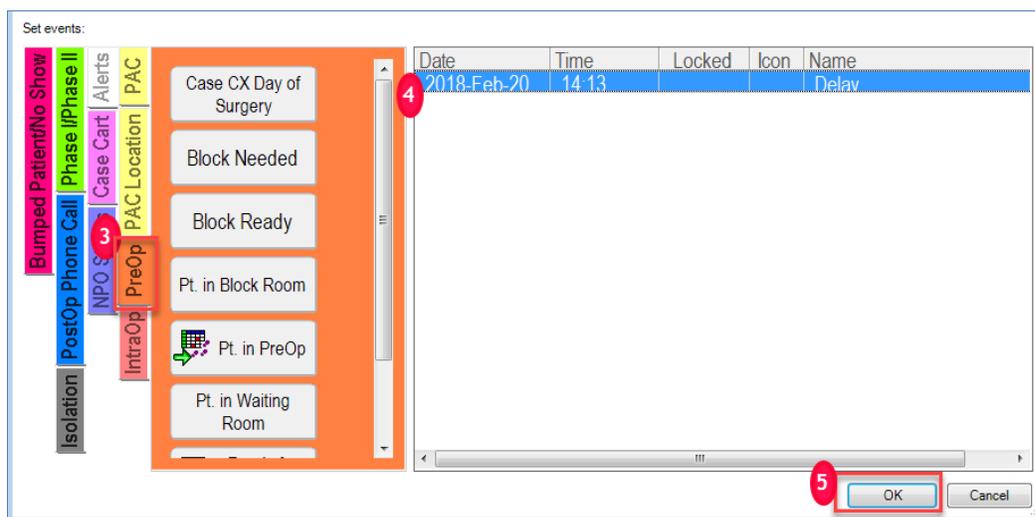
- The **Case Details** window opens.

2. Update the case information as follows in the upper left of the Case details window:

- Anticipated start - *1 hour later*

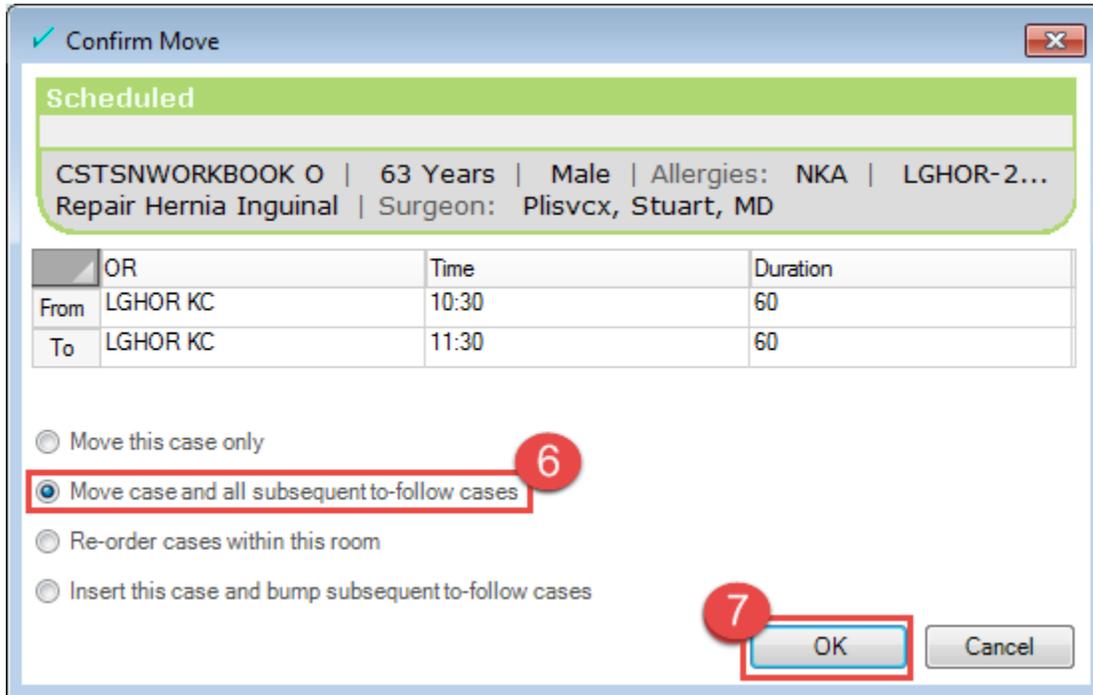
**Note:** Anticipated Stop and Duration automatically change when the start time is changed.

- Anticipated OR – keep the OR the same

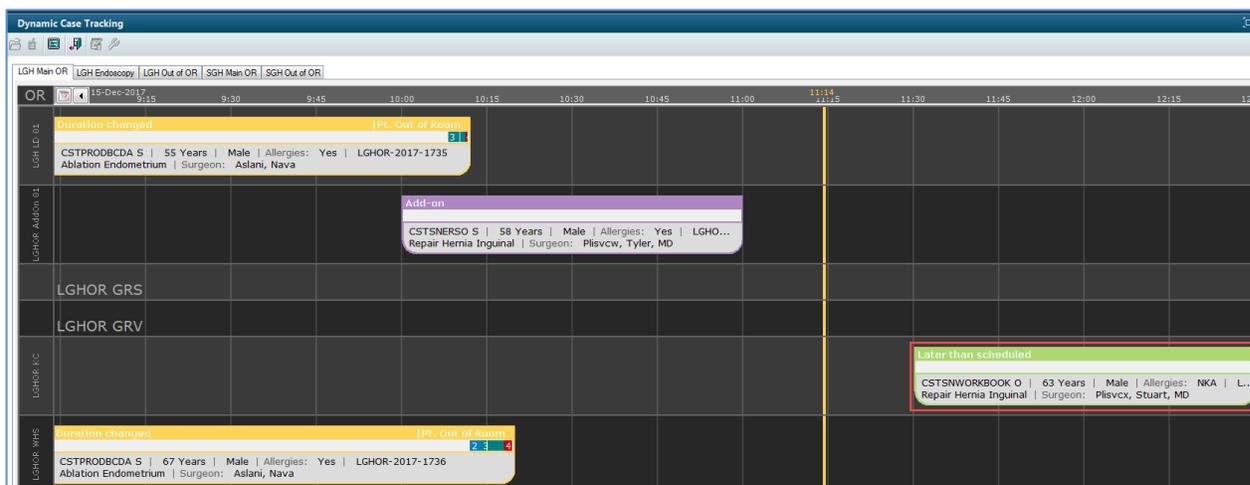


Update set events in the lower grid of the Case Details Window:

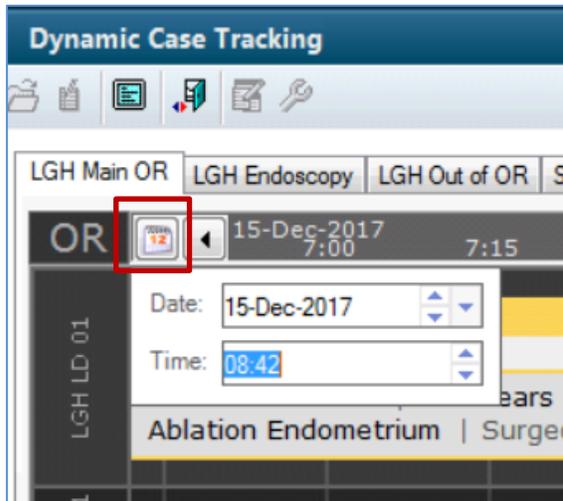
3. Click **PreOp** tab
4. Click on **Delay**
  - The event moves from the tab to the right into the details window
5. Click **OK**



- Review the Confirm Move window to make sure the information is correct.
6. Choose the option to **Move case and all subsequent to-follow cases**
  7. Click **OK**



- Verify Case moved to an hour later.



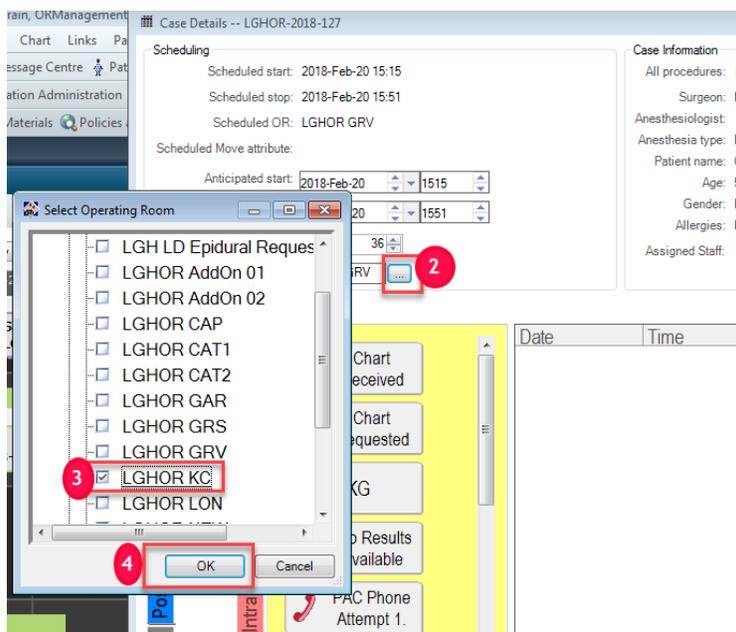
**Note:** To change the view to another date and time, you can click the calendar icon 



or use the scrolling arrows.

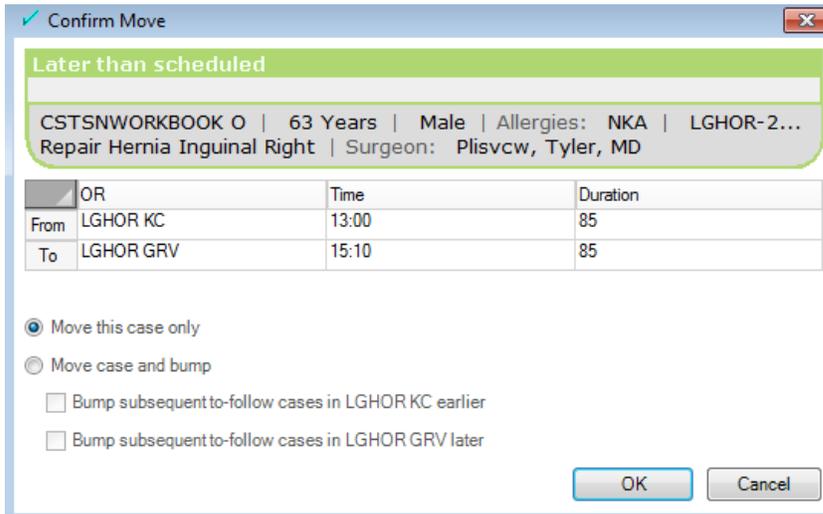
### To Change Case Details to a different OR:

1. In **Dynamic Case Tracking**, select the case you want from **LGHOR GRV** to view. Click **Case Details**  (or right click on the case and select **Case Details**).

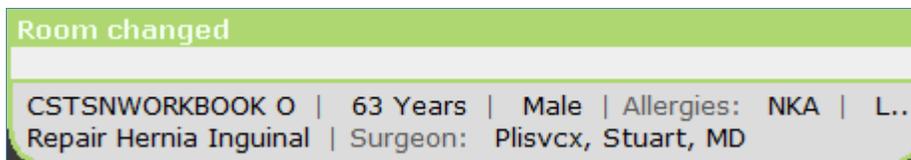


2. Review the Case Details window. Click the ellipsis to open the **Select Operating Room** window.
3. Select **LGHOR KC**.

4. Click **OK** to close the Select Operating Room window.
5. Click **OK** to close the Case Details window. The **Confirm Move** window displays.



- **Confirm Window** auto populates when change the case to a new room and time
6. Review the **Confirm Move** window to make sure the information is correct. Keep selection – Move this case only.
  7. Click **OK**. When the changes take effect, the case border color changes to reflect the status of Room Changed

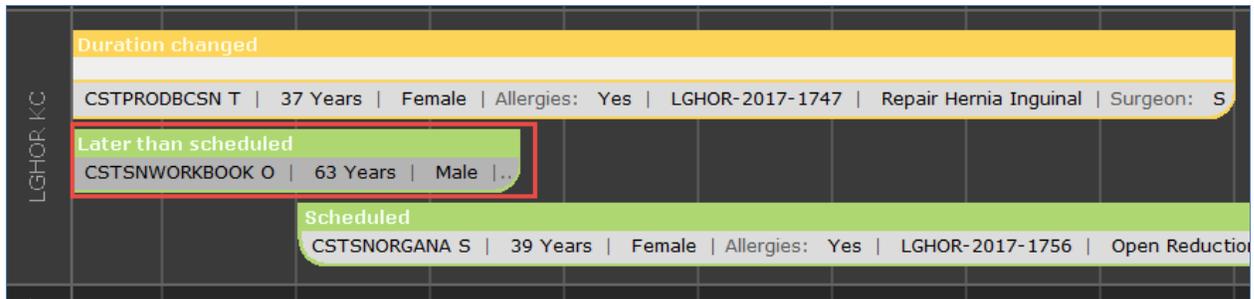


#### 4 Using Drag-and-Drop Functionality in Dynamic Case Tracking

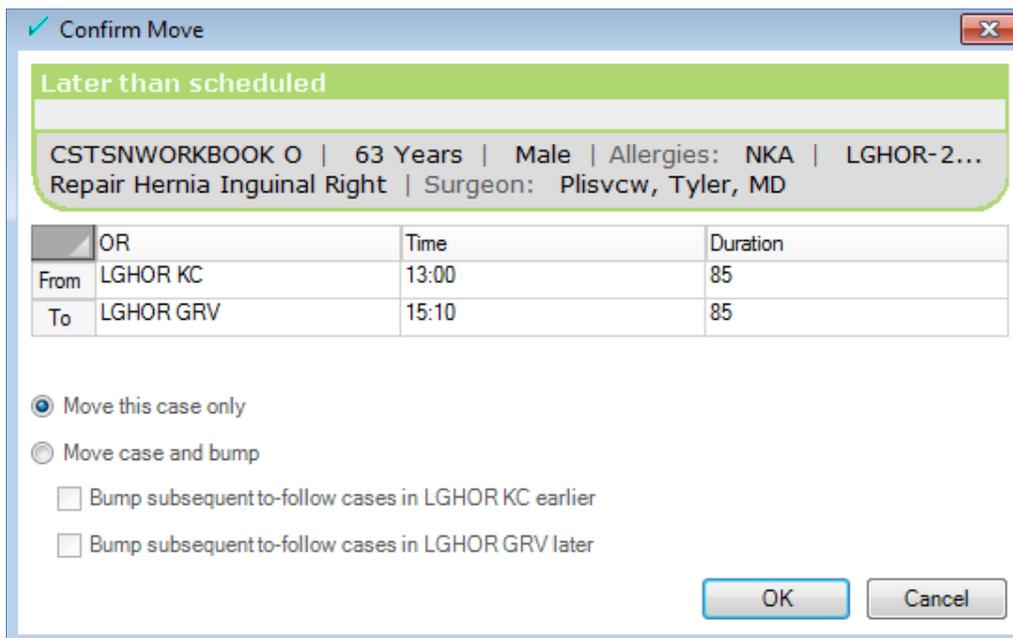
The anticipated OR for a case can be updated. You can only change the room before a case has been checked in. Once check-in has occurred the OR update must be made using the Nursing Record.

You can select a single case and drag it within the existing view to a different room, to a different time in the same room, or to a different time in a different room.

Complete the following steps to use drag-and-drop functionality to relocate a case:



1. Click the case to move. From **LGHOR KC**
2. Drag the case to the appropriate room (**LGHOR GRV**) and time



- **Confirm Window** auto populates when you drop the case on the new room and time
3. Review the **Confirm Move** window to make sure the information is correct. Keep the selection of Move this case only.
  4. Click **OK**. When the changes take effect, the case border color changes to reflect the status of Room Changed



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### Swapping Rooms Dynamic Case Tracking

You can swap cases from one room to another on the same calendar day by specifying the rooms to swap, and by specifying a start time.

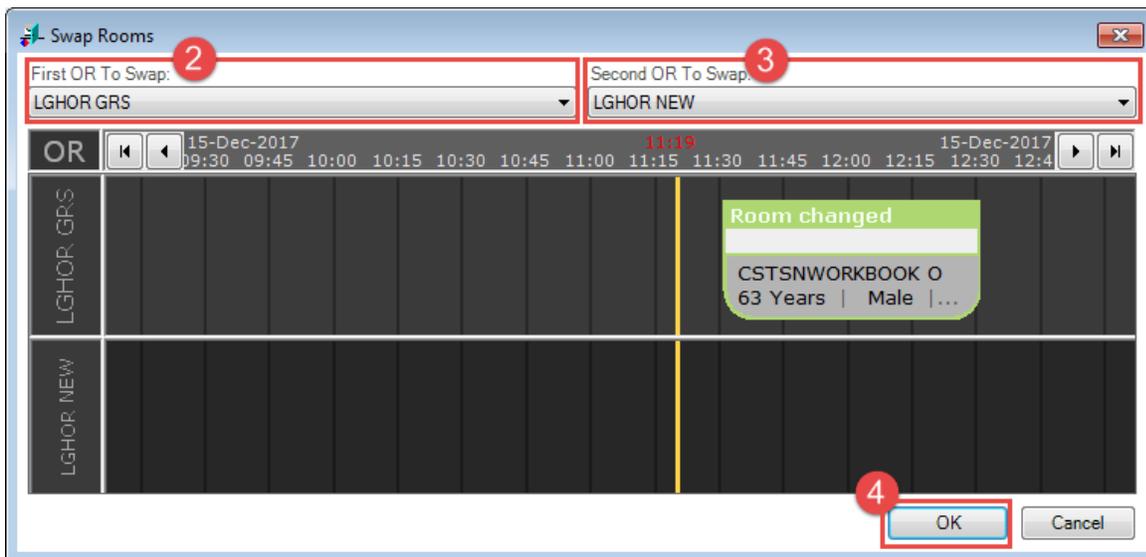
All cases beginning after the start time but before the end of the same calendar day are swapped.

Once a case has the first milestone event documented (indicating that it is now intra-operative), it can no longer be moved in Case Tracking Dynamic Case Tracking.

Complete the following steps to swap cases from one room to another:



1. Click **Swap Rooms** ( ).



- The Swap Rooms dialog box opens.
- 2. Select the first OR you want to swap cases for from the First OR to swap list.
- 3. Select the second OR you want to swap cases with from the Second OR to swap list.
- 4. Click **OK**. The cases are swapped.
  - The cases in First OR are swapped with the cases in the Second OR.

## Key Learning Points

- You will access Dynamic Case Tracking from PowerChart based off security and privileges of login and role.
- You will be able to update case details and set events using Dynamic Case Tracking.
- You will be able to use drag and drop functionality.
- You will be able to use swap room functionality.

## End of Workbook

You are ready for your Key Learning Review. Please contact your instructor for your Key Learning Review.